

Guide to create a new Fiscal Agent

1. Deactivate the existing Fiscal Agent **(Only for CSA Coordinators or CPMT Chair)**
 - a. Login to Account Management System under Applications on the CSA website's home page
 - b. Click on Edit/Update Users tab *(This tab is only active for Local Approver's i.e. CPMT Chair and CSA Coordinator)*
 - c. Local Approver's have the Edit/Update User tab. This tab will display list of all Users in the locality. This tab has three important features.
 - i. The View (Magnifying Glass icon) is used to view the details of a User.

Account Management System - OCS State Office (200) [Logout](#)

My Approvals Register User Edit Profile **Edit/Update Users** Activate Users Approver ToolKit SFD Admin

Edit / Update Existing Users

Agency/Locality /System:* Role:

Name:

Address:

ZipCode:

City:

Email:

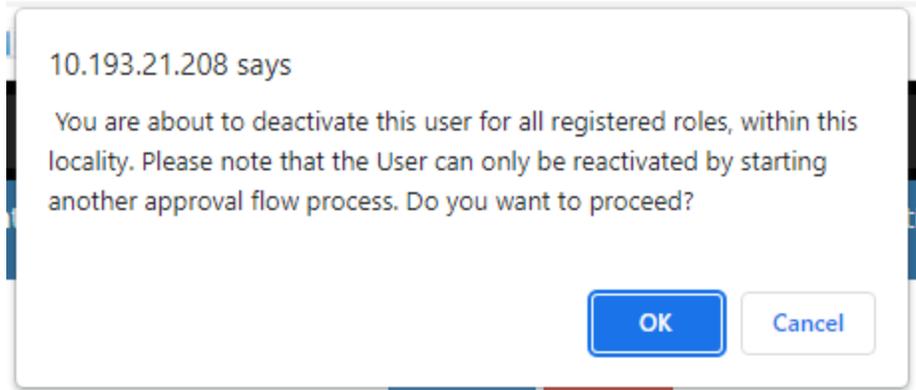
Show deleted/deactivated users

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Agency/Locality/Provider	Name	Phone	Email						
Albemarle (003)	Jennifer Wells	434-972-4011 X 3836	jwells2@albemarle.org						
Albemarle (003)	Kevin Wasilewski	434-872-4522	kwasilewski@albemarle.org						
Albemarle (003)	Neta Davis	434-972-1800	NETA.DAVIS@regionten.org						
Albemarle (003)	Tammy Critzer	434-872-4531	tcritzer@albemarle.org						

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- ii. The Edit (Pencil icon) is used to Edit the details of a User. It can be used to:
 - i. Edit User Information
 - ii. Add User roles
 - iii. Delete User roles
- iii. The Delete (Trash Can) icon is used to Delete/Deactivate a User in the AMS. When the following message is displayed, the User will have to click on the OK button,. Once a User is deactivated for all roles, the User can be reactivated only by starting a new approval flow process.



- d. Click OK.
2. Click on Register New User tab to register the new Fiscal Agent.
3. On this tab, the User can register a new User from their locality.
 - a. The new User details are keyed in
 - b. Click on the Register button at the bottom of the screen.
 - c. Depending on the Role requested an approval notification is sent to either Locality's CPMT Chair or Locality's CSA Coordinator.
 - i. **FA, CSA Coordinator – CPMT Chair Approval**
 - ii. **All other roles – CSA Coordinator Approval**

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Create New User

Name:*

Locality:*

Agency:*

Position:

Phone:*

Ext:

Fax:

Email:*

Address Line 1:*

Address Line 2:

P.O.Box#:

City:*

State:*

Zip Code:*

Zip Ext:

Role:*

Refresh
Input symbols

Register

4. The Locality Approvers need to click on their My Approval's tab
5. Click on the Approval icon
6. On the pop-up box click on the Approve button

Account Management System - OCS Sta

My Approvals Register User Edit

My Approvals

Locality/Agency	Name
Accomack (001)	Amy Ford
Accomack (001)	1373

User Details

Name: **Amy Ford** Agency: **County of Accomack**
Locality/Agency: **Accomack (001)**
Phone: **757-787-5737** Ext:
Fax: **757-787-2468**
Email: **aford@co.accomack.va.us**
Address: **23296 Courthouse Ave Accomack VA 23301**
Approval Request Date: **7/20/2022 1:13:22 AM**
Active Roles: **Fiscal Agent**
Roles Pending Approval: DSU/RA
Rejection Reason:



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